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# MONTANA

## EMPLOYMENT AND LABOR FORCE TRENDS

Volume 18, Number 3 3 rd Quarter 1988 Report

A Quarterly Publication Of The Research & Analysis Bureau

## ECONOMIC HIGHLIGHTS AND EMPLOYMENT OUTLOOK

Unseasonally dry conditions and above normal temperatures continued to prolong the drought conditions in Montana. The shortage of measurable moisture throughout July, August and September caused employment in Agriculture to continue dropping. The drought, coupled with work stoppages, also hurt employment in both the Timber and Construction Industries. (Approximately 1800 were involved in the work stoppages during the months of July and August.)

Comparing third quarter with the corresponding quarter of 1987 shows that the civilian labor force has declined by 10,300. This represents a drop of 7,200 in total employment and nearly a 3,100 reduction in the number of those individuals classified as unemployed. These preliminary figures suggest that many Montanans are either dropping out of the labor market because they have become discouraged or may have relocated to other states seeking better employment opportunities. An unofficial poll of some of the state's major labor market areas indicates that employment opportunities may exist; however the jobs seem to be grouped into two different classes. Either the jobs have minimal pay and hours or they are of a high technical nature that the individual feels that he/she doesn't meet the job qualifications.

## Montana Quarterly Trends

| Quarter | CLF* | Employment | Unemployment | Rate |
|---|---|---|---|---|
| Third 1988 | 396.7 | 374.6 | 22.1 | 5.6% |
| Second '88 | 409.2 | 380.6 | 28.6 | 7.0% |
| First 1988 | 399.9 | 362.8 | 37.1 | 9.3% |
| Fourth '87 | 399.3 | 374.0 | 25.3 | 6.3% |
| Third 1987 | 407.0 | 381.8 | 25.2 | 6.2% |

*CLF = Civilian Labor Force (In Thousands)

## UNEMPLOYMENT RATE, MONTANA AND U.S.

The seasonally adjusted jobless rate for Montana for the month of September was estimated at 6.3 percent, which is .9 percent above the U.S. rate. The trend continues to be above the national rate. For the same period one year ago Montana was 1.3 percent above the U.S. rate.

Unemployment Rate, Montana & U.S.
Seasonally Adjusted

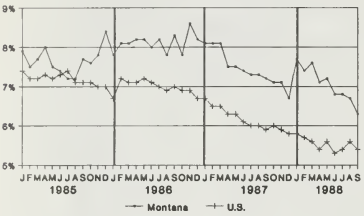


Chart One

Total non-ag employment for the three-month period from July to September shows a normal seasonal increase as schools went back into session. However, in September, there are about 1000 more jobs than September 1987-these are jobs in government employment as additional fire fighters/support personnel were hired to combat fires in Montana and Yellowstone Park.

Construction employment continues to follow the same trend and about the same level of employment as last year, but remained lower than 1986. General building and Special Trades reported more jobs than one year ago while Heavy Construction reported fewer.

Employment in the Manufacturing industry for the three month period averaged about 1000 less than for the same period last year. Most of the decrease was primarily due to the labor disputes in Lumber and Wood Production. The work stoppage ended early in September.

Finance, Insurance and Real Estate lost 200 jobs from July through September----- 150 of these were in Real Estate. Since last

## Total Non-Agricultural Employment Montana, 1986-1988

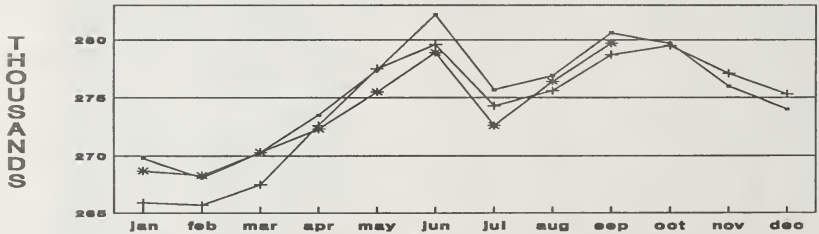


Chart Two

year employment has gone down nearly 700--300 in Banking, 100 in Insurance, and 230 in Real Estate.

Service employment remains well above the 1987 level by 1000; however, job loss in August and September was at a greater than the normal seasonal rate due to early closure of businesses such as lodging, amusement and recreation in the Yellowstone Park and Cooke City areas due to the fires.

Mining employment for the three months averaged about 6,300 which represents an increase of 100 employees over the previous year. Some erratic behavior was noted in the months of August and September. Primarily this was due to a new mining operation trying to start up.

Transportation, Communication and Utilities remained unchanged for the three month period. The trend this year in T.C.U. is quite similar to last year, but is down about 400 fewer jobs---150 in Communication and 270 in Utilities.

Employment in the Trade Industries represents a typical seasonal pattern, but there are 1,300 fewer employees in eating and drinking places than there were last year. From August to September most of the decline was in eating and drinking places(600); food stores, service stations and miscellaneous stores reduced employment by 200 each.

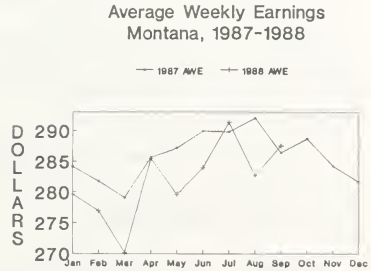


Chart Three

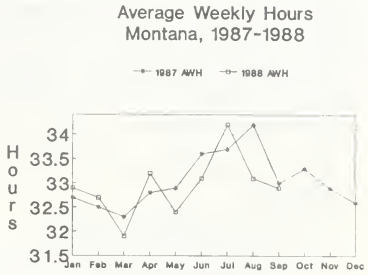


Chart Four

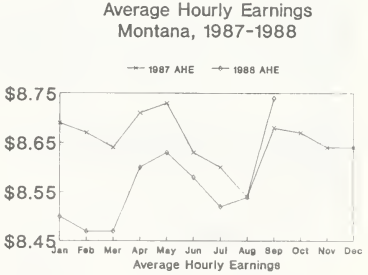


Chart Five

## AVERAGE WEEKLY EARNINGS/HOURS

Average weekly earnings increased over August by $4.88 to $287.55 in September, $1.11 more than it was a year ago. Average weekly hours went down by .2 from 33.1 in August to 32.9 in September. Industries with declining weekly hours were Construction, Manufacturing, Trade and Services. Average

hourly earnings went up 20 cents an hour to $8.74 in September. This is mostly a seasonal increase as many lower paying jobs in lower paying industries ended and many of these workers went back to school. Also, the Lumber and Woods production industry ended its work stoppage which had an effect on the higher hourly earnings. Other major industries showed improvement in average hourly earnings.

## HIGHLIGHTS BY INDUSTRY COMPONENTS

### AGRICULTURE

A Holly Sugar spokesperson indicated that workers have been testing out equipment in preparation for the start of its sugar beet operation. Hiring for this year's campaign is nearly complete. The local Job Service opened its office at 6 a.m. during the month of September in order to help in the placement of beet workers and truck drivers. Approximately 100,000 tons of beets have been contracted for the early harvest. General harvest starts about the 1st of October.

### CONSTRUCTION

Construction has begun on a $80 million coal-fired power plant in southeast Montana that will produce 35 megawatts of energy. Up to 150 construction workers will be employed on the new plant, seven miles north of Colstrip. After completion in 1990 the project will have 35 permanent workers.

Construction of a new auto parts distribution center in Billings has gotten underway. The center will serve parts of Montana, Wyoming and the Dakotas, will employ 30-50 people, and will serve 55-60 parts jobbers. Also the $1 million project will provide 30 construction jobs and employ about 20 subcontractor companies.

### GOVERNMENT

The cost of the 23,000-acre Early Bird fire on the Northern Cheyenne Indian Reservation was estimated at $980,000. About 800 fire fighters from the BLM, BIA, Forest Service, Rosebud County, Wyoming, Idaho, and California as well as Montana Indian crews were on the fire at its height.

A fire in the Custer National Forest burned 57,000 acres or three-quarters of the Custer National Forest. The fire, called the Brewer fire, caused an estimated $3.3 million in timber and grassland damages.

Another wildfire claimed over a section and a half of rangeland north of Vananda. Over 30 people fought the fire before it was contained.

Seven Montana tribes and one Native American organization are among 27 in the Rocky Mountain region receiving grants for employment and training programs from the U. S. Department of Labor. The Montana groups will receive $1.69 million in grants under Title IV Section 401 of the Job Training Partnership Act. The grants cover the 12-month period of July 1988 through June 1989.

Eighteen full-time Montana Army National Guard employees will be transferred to Havre by September 1 as part of a reorganization of the peace time militia.

State Job Service offices in western Montana did a brisk business as the U.S. Forest Service called for local hiring of 400 emergency fire fighters to fight the state's lingering blazes.

In Billings the junior-high enrollment was reported to be up by 100 students, but Billings'

three public high schools have 214 fewer students and the elementary schools have 162 fewer students.

The results of a business survey conducted in Richland County show that businesses ranked liability insurance as the number one factor impacting their present financial condition. Workers compensation came in third, just below energy and utility costs.

### LUMBER AND WOODS

Strike talks broke down between representatives of Willamette Industries Inc. and two labor unions in their attempt to move toward a resolution of the Northwest timber strike. The strike, which began June 6, has idled some 8,500 workers in five states. The unions are seeking restoration of wages and benefits that were cut in the last contract. They want a settlement reached with Bohemia Inc. of Eugene to serve as an industry standard. That pact includes a 17 percent wage hike over four years. Nearly all of the timber companies in the region have refused to accept the Bohemia terms. Representatives of those companies say they can't remain competitive if they agree to such a wage increase.

Workers walked off the job at the DAW Forest Products Co. mill in Superior. The mill's 115 union workers belong to the International Woodworkers of America.

A spokesperson said that, "in the last nine years, we've only worked one full year without a strike or layoff."

### MANUFACTURING

Intentions to assemble Korean railcar kits at a local maintenance facility was confirmed by company officials in Miles City. The railcar kit assembly plant rebuilds steel coal cars, and their long term project overhauls tank cars. The current employment figure of 37 would increase to as high as 60 by the end of the year.

### PETROLEUM

Exxon Oil Company has purchased controlling interest of the Bell Creek oil field and will begin taking over operations within the next three months. Of the 490 original oil wells in Belle Creek, about 91 remain in operation. About 2500 barrels a day are currently being produced.

### TRADE RETAIL-WHOLESALE

A furniture store that has been a local landmark for the community of Belgrade announced its plan to close due to dwindling sales and to the overabundance of furniture stores in the area.

A food-brokerage firm in Great Falls is closing its branch as part of a consolidation move. The firm is one of the state's largest food brokers, serving restaurants and stores through branches in Billings, Missoula and Great Falls. The closure will affect about 30 employees.

### TRANSPORTATION-COMMUNICATIONS-UTILITIES

Burlington Northern Railroad plans to close its divisional office in Billings and move about 20 management jobs to Havre. The action is part of a corporate reshuffling of the Operations Department that involves reduc-

ing the 15 divisional offices to nine, and the five regional headquarters to two.

Another airline service is scheduled to serve the Billings area. This brings to eight the number of carriers serving the area.

The oldest radio station in the Gallatin Valley went off the air as the result of too many debts. The broadcast station employed eight workers.

## SERVICES

Contracts for 295 registered nurses at both Missoula hospitals have expired and a federal mediator has been called in to help settle both disputes. The contract disputes were over wages, shift differential and language issues, including the "standby" provisions for some departments, are unresolved.

An anchor tenant of Bozeman's high technology park filed for corporate reorganization under Chapter 11 in federal bankruptcy court. The company, a hazardous waste clean-up firm, has indicated that several employees had been laid off as the 2-year-old company had to trim its workforce because several contracts hadn't closed. The company received another setback when the state Supreme Court ruled that it is unconstitutional for the Montana Science and Technology Alliance to loan public "seed money" to fledgling high-tech firms. The company had a commitment from the Montana Science and Technology Alliance for a $350,000 loan.

Tourist traffic early in the third quarter was up as much as 27 percent over last year, according to state and local officials. Television promotions have been projecting a new image of Montana in several regions of the country, including the northcentral states and the Pacific Northwest. Montana ski resorts reported 812,900 skier days. That was up 31,646 from the previous year. The increase meant an additional $6 million in gross sales to state ski areas, bringing total gross sales to $40 million.

TABLE I-A
MONTANA MONTHLY LABOR FORCE BY COUNTY 88BMK
CURRENT POPULATION SURVEY DATA SEPTEMBER 1988

| COUNTY | CIVILIAN LABOR FORCE | EMPLOYMENT | UNEMPLOYMENT | PERCENT RATE |
|---|---|---|---|---|
| STATEWIDE | 391246 | 372589 | 18657 | 4.8 |
| CASCADE | 35558 | 33766 | 1792 | 5.0 |
| YELLOWSTONE | 57187 | 54672 | 2515 | 4.4 |
| BEAVERHEAD | 5012 | 4866 | 146 | 2.9 |
| BIG HORN | 4480 | 4108 | 372 | 8.3 |
| BLAINE | 3529 | 3289 | 240 | 6.8 |
| BROADWATER | 1486 | 1416 | 70 | 4.7 |
| CARBON | 3794 | 3648 | 146 | 3.8 |
| CARTER | 934 | 916 | 18 | 1.9 |
| CHOUTEAU | 2680 | 2595 | 85 | 3.2 |
| CUSTER | 6188 | 6004 | 184 | 3.0 |
| DANIELS | 1213 | 1197 | 16 | 1.3 |
| DAWSON | 5368 | 5164 | 204 | 3.8 |
| DEER LODGE | 4376 | 4127 | 249 | 5.7 |
| FALLON | 1349 | 1295 | 54 | 4.0 |
| FERGUS | 5596 | 5374 | 222 | 4.0 |
| FLATHEAD | 28761 | 26877 | 1884 | 6.6 |
| GALLATIN | 25624 | 24946 | 678 | 2.6 |
| GARFIELD | 833 | 826 | 7 | .8 |
| GLACIER | 6039 | 5658 | 381 | 6.3 |
| GOLDEN VALLEY | 598 | 567 | 31 | 5.2 |
| GRANITE | 1292 | 1234 | 58 | 4.5 |
| HILL | 8147 | 7759 | 388 | 4.8 |
| JEFFERSON | 5760 | 5589 | 171 | 3.0 |
| JUDITH BASIN | 1365 | 1320 | 45 | 3.3 |
| LAKE | 9837 | 9326 | 511 | 5.2 |
| LEWIS AND CLARK | 26735 | 25606 | 1129 | 4.2 |
| LIBERTY | 924 | 910 | 14 | 1.5 |
| LINCOLN | 8826 | 8068 | 758 | 8.6 |
| MC CONE | 1272 | 1227 | 45 | 3.5 |
| MADISON | 3176 | 3042 | 134 | 4.2 |
| MEAGHER | 1095 | 1050 | 45 | 4.1 |
| MINERAL | 1566 | 1470 | 96 | 6.1 |
| MISSOULA | 39367 | 37635 | 1732 | 4.4 |
| MUSSELSHELL | 1831 | 1732 | 99 | 5.4 |
| PARK | 5721 | 5396 | 325 | 5.7 |
| PETROLEUM | 292 | 278 | 14 | 4.8 |
| PHILLIPS | 2839 | 2727 | 112 | 3.9 |
| PONDERA | 2764 | 2670 | 94 | 3.4 |
| POWDER RIVER | 1320 | 1293 | 27 | 2.0 |
| POWELL | 3386 | 3294 | 92 | 2.7 |
| PRAIRIE | 720 | 702 | 18 | 2.5 |
| RAVALLI | 11228 | 10494 | 734 | 6.5 |
| RICHLAND | 5915 | 5637 | 278 | 4.7 |
| ROOSEVELT | 5102 | 4830 | 272 | 5.3 |
| ROSEBUD | 4860 | 4548 | 312 | 6.4 |
| SANDERS | 3217 | 2894 | 323 | 10.0 |
| SHERIDAN | 2494 | 2436 | 58 | 2.3 |
| SILVER BOW | 13470 | 12653 | 817 | 6.1 |
| STILLWATER | 3000 | 2883 | 117 | 3.9 |
| SWEET GRASS | 1427 | 1378 | 49 | 3.4 |
| TETON | 2896 | 2772 | 124 | 4.3 |
| TOOLE | 2325 | 2240 | 85 | 3.7 |
| TREASURE | 449 | 438 | 11 | 2.4 |
| VALLEY | 4394 | 4197 | 197 | 4.5 |
| WHEATLAND | 1077 | 1032 | 45 | 4.2 |
| WIBAUX | 552 | 518 | 34 | 6.2 |

TABLE I-B
MONTANA MONTHLY LABOR FORCE BY COUNTY 88BMK
CURRENT POPULATION SURVEY DATA AUGUST 1988

| COUNTY | CIVILIAN LABOR FORCE | EMPLOYMENT | UNEMPLOYMENT | PERCENT RATE |
|---|---|---|---|---|
| STATEWIDE | 401568 | 378574 | 22994 | 5.7 |
| CASCADE | 36371 | 34322 | 2049 | 5.6 |
| YELLOWSTONE | 58027 | 54923 | 3104 | 5.3 |
| BEAVERHEAD | 5223 | 5059 | 164 | 3.1 |
| BIG HORN | 4825 | 4248 | 577 | 12.0 |
| BLAINE | 3599 | 3274 | 325 | 9.0 |
| BROADWATER | 1632 | 1546 | 86 | 5.3 |
| CARBON | 3927 | 3761 | 166 | 4.2 |
| CARTER | 1150 | 1116 | 34 | 3.0 |
| CHOUTEAU | 3030 | 2933 | 97 | 3.2 |
| CUSTER | 6411 | 6207 | 204 | 3.2 |
| DANIELS | 1350 | 1320 | 30 | 2.2 |
| DAWSON | 5614 | 5324 | 290 | 5.2 |
| DEER LODGE | 4507 | 4133 | 374 | 8.3 |
| FALLON | 1465 | 1394 | 71 | 4.8 |
| FERGUS | 6062 | 5739 | 323 | 5.3 |
| FLATHEAD | 29429 | 27348 | 2081 | 7.1 |
| GALLATIN | 26171 | 25411 | 760 | 2.9 |
| GARFIELD | 970 | 961 | 9 | .9 |
| GLACIER | 6449 | 5909 | 540 | 8.4 |
| GOLDEN VALLEY | 645 | 615 | 30 | 4.7 |
| GRANITE | 1408 | 1307 | 101 | 7.2 |
| HILL | 8318 | 7842 | 476 | 5.7 |
| JEFFERSON | 5623 | 5440 | 183 | 3.3 |
| JUDITH BASIN | 1514 | 1473 | 41 | 2.7 |
| LAKE | 10311 | 9579 | 732 | 7.1 |
| LEWIS AND CLARK | 26500 | 25110 | 1390 | 5.2 |
| LIBERTY | 1015 | 991 | 24 | 2.4 |
| LINCOLN | 8972 | 8094 | 878 | 9.8 |
| MC CONE | 1374 | 1350 | 24 | 1.7 |
| MADISON | 3661 | 3497 | 164 | 4.5 |
| MEAGHER | 1220 | 1173 | 47 | 3.9 |
| MINERAL | 1583 | 1473 | 110 | 6.9 |
| MISSOULA | 39224 | 36866 | 2358 | 6.0 |
| MUSSELSHELL | 1897 | 1802 | 95 | 5.0 |
| PARK | 6012 | 5724 | 288 | 4.8 |
| PETROLEUM | 327 | 325 | 2 | .6 |
| PHILLIPS | 3024 | 2908 | 116 | 3.8 |
| PONDERA | 3031 | 2913 | 118 | 3.9 |
| POWDER RIVER | 1475 | 1441 | 34 | 2.3 |
| POWELL | 3388 | 3248 | 140 | 4.1 |
| PRAIRIE | 815 | 791 | 24 | 2.9 |
| RAVALLI | 11255 | 10384 | 871 | 7.7 |
| RICHLAND | 6046 | 5575 | 471 | 7.8 |
| ROOSEVELT | 5434 | 5019 | 415 | 7.6 |
| ROSEBUD | 4922 | 4500 | 422 | 8.6 |
| SANDERS | 3239 | 2845 | 394 | 12.2 |
| SHERIDAN | 2670 | 2586 | 84 | 3.1 |
| SILVER BOW | 13296 | 12257 | 1039 | 7.8 |
| STILLWATER | 3066 | 2952 | 114 | 3.7 |
| SWEET GRASS | 1601 | 1552 | 49 | 3.1 |
| TETON | 3198 | 3101 | 97 | 3.0 |
| TOOLE | 2328 | 2220 | 108 | 4.6 |
| TREASURE | 499 | 493 | 6 | 1.2 |
| VALLEY | 4680 | 4504 | 176 | 3.8 |
| WHEATLAND | 1175 | 1123 | 52 | 4.4 |
| WIBAUX | 610 | 573 | 37 | 6.1 |

TABLE I-C
MONTANA MONTHLY LABOR FORCE BY COUNTY 88BMK
CURRENT POPULATION SURVEY DATA JULY 1988

| COUNTY | CIVILIAN LABOR FORCE | EMPLOYMENT | UNEMPLOYMENT | PERCENT RATE |
|---|---|---|---|---|
| STATEWIDE | 397963 | 373195 | 24768 | 6.2 |
| CASCADE | 35991 | 33688 | 2303 | 6.4 |
| YELLOWSTONE | 58375 | 54816 | 3559 | 6.1 |
| BEAVERHEAD | 5059 | 4857 | 202 | 4.0 |
| BIG HORN | 4591 | 3995 | 596 | 13.0 |
| BLAINE | 3446 | 3111 | 335 | 9.7 |
| BROADWATER | 1614 | 1508 | 106 | 6.6 |
| CARBON | 3924 | 3702 | 222 | 5.7 |
| CARTER | 1104 | 1071 | 33 | 3.0 |
| CHOUTEAU | 2945 | 2860 | 85 | 2.9 |
| CUSTER | 6499 | 6264 | 235 | 3.6 |
| DANIELS | 1312 | 1279 | 33 | 2.5 |
| DAWSON | 5465 | 5250 | 215 | 3.9 |
| DEER LODGE | 4448 | 4120 | 328 | 7.4 |
| FALLON | 1428 | 1374 | 54 | 3.8 |
| FERGUS | 5925 | 5584 | 341 | 5.8 |
| FLATHEAD | 29261 | 27036 | 2225 | 7.6 |
| GALLATIN | 26492 | 25642 | 850 | 3.2 |
| GARFIELD | 946 | 937 | 9 | 1.0 |
| GLACIER | 6353 | 5683 | 670 | 10.5 |
| GOLDEN VALLEY | 587 | 550 | 37 | 6.3 |
| GRANITE | 1364 | 1257 | 107 | 7.8 |
| HILL | 8165 | 7671 | 494 | 6.1 |
| JEFFERSON | 5514 | 5316 | 198 | 3.6 |
| JUDITH BASIN | 1480 | 1430 | 50 | 3.4 |
| LAKE | 10581 | 9939 | 642 | 6.1 |
| LEWIS AND CLARK | 26614 | 25116 | 1498 | 5.6 |
| LIBERTY | 991 | 969 | 22 | 2.2 |
| LINCOLN | 8418 | 7518 | 900 | 10.7 |
| MC CONE | 1348 | 1309 | 39 | 2.9 |
| MADISON | 3427 | 3281 | 146 | 4.3 |
| MEAGHER | 1194 | 1133 | 61 | 5.1 |
| MINERAL | 1664 | 1457 | 207 | 12.4 |
| MISSOULA | 39273 | 36852 | 2421 | 6.2 |
| MUSSELSHELL | 1895 | 1782 | 113 | 6.0 |
| PARK | 5844 | 5524 | 320 | 5.5 |
| PETROLEUM | 325 | 316 | 9 | 2.8 |
| PHILLIPS | 2827 | 2733 | 94 | 3.3 |
| PONDERA | 2941 | 2815 | 126 | 4.3 |
| POWDER RIVER | 1431 | 1401 | 30 | 2.1 |
| POWELL | 3350 | 3206 | 144 | 4.3 |
| PRAIRIE | 819 | 763 | 56 | 6.8 |
| RAVALLI | 10962 | 10077 | 885 | 8.1 |
| RICHLAND | 5925 | 5457 | 468 | 7.9 |
| ROOSEVELT | 5303 | 4879 | 424 | 8.0 |
| ROSEBUD | 4957 | 4461 | 496 | 10.0 |
| SANDERS | 3137 | 2761 | 376 | 12.0 |
| SHERIDAN | 2613 | 2519 | 94 | 3.6 |
| SILVER BOW | 12996 | 11869 | 1127 | 8.7 |
| STILLWATER | 2984 | 2845 | 139 | 4.7 |
| SWEET GRASS | 1566 | 1512 | 54 | 3.4 |
| TETON | 3145 | 2999 | 146 | 4.6 |
| TOOLE | 2331 | 2203 | 128 | 5.5 |
| TREASURE | 486 | 479 | 7 | 1.4 |
| VALLEY | 4597 | 4397 | 200 | 4.4 |
| WHEATLAND | 1125 | 1060 | 65 | 5.8 |
| WIBAUX | 606 | 562 | 44 | 7.3 |

TABLE II

M O N T A N A

STATEWIDE EMPLOYMENT BY INDUSTRY

(IN THOUSANDS)

1988

| | JAN. | FEB. | MAR. | APR. | MAY | JUN. | JUL. | AUG. | SEP. | OCT. | NOV. | DEC. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| (RESIDENCE DATA) | | | | | | | | | | | | |
| CIVILIAN LABOR FORCE - PERSONS1/..... | 397.0 | 399.5 | 403.1 | 408.1 | 407.4 | 412.2 | 397.9 | 401.6 | 391.3 | | | |
| EMPLOYED PERSONS..... | 359.1 | 363.1 | 366.1 | 376.5 | 379.8 | 385.6 | 373.2 | 378.6 | 372.6 | | | |
| LABOR MANAGEMENT DISPUTE2/ | * | * | * | * | * | 1.0 | 1.8 | 1.8 | * | | | |
| PERSONS EMPLOYED IN AGRICULTURE..... | 23.0 | 26.8 | 29.2 | 36.5 | 38.5 | 40.2 | 39.2 | 40.5 | 32.1 | | | |
| UNEMPLOYED PERSONS..... | 37.9 | 36.4 | 37.0 | 31.6 | 27.6 | 26.6 | 24.7 | 23.0 | 18.7 | | | |
| PERCENT OF LABOR FORCE, UNADJUSTED 3/.. | 9.5% | 9.1% | 9.2% | 7.7% | 6.8% | 6.5% | 6.2% | 5.7% | 4.8% | | | |
| PERCENT OF LABOR FORCE, SEASONALLY ADJ. | 7.7% | 7.4% | 7.6% | 7.1% | 7.2% | 6.8% | 6.8% | 6.7% | 6.3% | | | |
| U.S. UNADJUSTED..... | 6.3% | 6.2% | 5.9% | 5.3% | 5.4% | 5.5% | 5.5% | 5.4% | 5.2% | | | |
| U.S. SEASONALLY ADJUSTED..... | 5.8% | 5.7% | 5.6% | 5.4% | 5.6% | 5.3% | 5.4% | 5.6% | 5.4% | | | |
| (ESTABLISHMENT DATA) 1988 | | | | | | | | | | | | |
| NON-FARM WAGE AND SALARY JOBS..... | 268.7 | 268.3 | 270.3 | 272.3 | 275.5 | 278.8 | 272.6 | 276.4 | 280.2 | | | |
| TOTAL PRIVATE..... | 199.4 | 198.5 | 200.1 | 202.0 | 205.2 | 208.2 | 209.4 | 211.8 | 210.4 | | | |
| MANUFACTURING..... | 20.6 | 20.4 | 20.1 | 20.2 | 20.6 | 20.4 | 20.4 | 20.2 | 21.3 | | | |
| MINING..... | 5.6 | 5.7 | 5.9 | 5.9 | 5.9 | 6.1 | 6.2 | 6.6 | 6.2 | | | |
| CONTRACT CONSTRUCTION..... | 7.0 | 6.6 | 6.9 | 8.2 | 9.1 | 9.8 | 9.7 | 10.4 | 10.3 | | | |
| TRANSPORTATION AND PUBLIC UTILITIES... | 19.1 | 19.0 | 18.9 | 18.8 | 19.0 | 19.3 | 19.2 | 19.2 | 19.3 | | | |
| TRADE..... | 70.9 | 70.1 | 71.1 | 72.0 | 72.8 | 74.2 | 74.2 | 75.1 | 74.0 | | | |
| WHOLESALE TRADE..... | 14.6 | 14.4 | 14.6 | 14.9 | 14.9 | 15.0 | 15.3 | 15.4 | 15.2 | | | |
| RETAIL TRADE..... | 56.3 | 55.7 | 56.5 | 57.1 | 57.9 | 59.2 | 58.9 | 59.7 | 58.8 | | | |
| FINANCE, INSURANCE AND REAL ESTATE.... | 12.6 | 12.6 | 12.5 | 12.4 | 12.5 | 12.6 | 12.7 | 12.7 | 12.6 | | | |
| SERVICES..... | 63.6 | 64.1 | 64.7 | 64.5 | 65.3 | 65.8 | 67.0 | 67.6 | 66.7 | | | |
| GOVERNMENT..... | 69.3 | 69.8 | 70.2 | 70.3 | 70.3 | 70.6 | 63.2 | 64.6 | 69.8 | | | |
| FEDERAL GOVERNMENT..... | 11.9 | 11.7 | 11.7 | 11.9 | 12.1 | 13.2 | 13.3 | 14.4 | 14.8 | | | |
| STATE AND LOCAL GOVERNMENT..... | 57.4 | 58.1 | 58.5 | 58.4 | 58.2 | 57.3 | 49.8 | 50.2 | 55.1 | | | |

1/ ESTIMATES BASED ON NATIONAL HOUSEHOLD SAMPLE, CENSUS AND OTHER RELATIONSHIPS: INCLUDES SELF-EMPLOYED, UNPAID FAM AND DOMESTIC WORKERS. CURRENT MONTH PRELIMINARY. REVISED TO 1987 BENCHMARKS.

2/ NON-ADDITIVE - INCLUDED IN TOTAL EMPLOYMENT.

3/ COMPUTED FROM WHOLE (UNROUNDED) NUMBERS. ESTABLISHMENT SERIES BEGAN JANUARY 1964; RESIDENCE SERIES IN JANUARY 197

SOURCE FOR RESIDENCE DATA: SEE TECHNICAL NOTES 5-1 AND 5-2 ON FINAL PAGE.

SOURCE FOR ESTABLISHMENT DATA: SEE TECHNICAL NOTE 5-4 ON FINAL PAGE.

* UNDER 50.

TABLE III

MONTANA HOURS & EARNINGS

For Private Nonagricultural Production Workers

| | Production Employment (In Thousands) | | | | Average Weekly Earnings | | | |
|---|---|---|---|---|---|---|---|---|
| | Sep. 1988 | Aug. 1988 | July 1988 | Sep. 1987 | Sep. 1988 | Aug. 1988 | July 1988 | Sep. 1987 |
| TOTAL PRIVATE | 173.5 | 175.5 | 173.2 | 174.3 | $ 8.70 | $ 8.54 | $ 8.52 | $ 8.68 |
| MANUFACTURING | 15.4 | 14.5 | 14.8 | 16.0 | 10.69 | 10.48 | 10.70 | 10.63 |
| Durable Goods | 10.5 | 9.8 | 10.2 | 11.1 | 10.40 | 10.23 | 10.40 | 10.52 |
| Non-Durable | 4.9 | 4.7 | 4.6 | 4.9 | 11.30 | 11.04 | 11.39 | 10.88 |
| MINING | 4.9 | 5.2 | 4.8 | 4.8 | 13.46 | 13.19 | 13.34 | 13.67 |
| CONSTRUCTION | 8.0 | 8.2 | 7.5 | 8.0 | 14.35 | 14.13 | 14.17 | 14.23 |
| *TCU | 16.3 | 16.2 | 16.2 | 16.4 | 13.01 | 12.82 | 12.77 | 12.45 |
| Transportation | 10.3 | 10.1 | 10.1 | 10.1 | 12.37 | 12.31 | 12.00 | 11.67 |
| Communications | 6.0 | 6.1 | 6.1 | 6.3 | 14.03 | 13.66 | 13.94 | 13.67 |
| TRADE | 64.9 | 66.0 | 65.1 | 65.0 | 6.77 | 6.63 | 6.68 | 6.84 |
| Wholesale Trade | 12.5 | 12.7 | 12.5 | 12.4 | 9.01 | 8.86 | 8.94 | 9.28 |
| Retail Trade | 52.4 | 53.3 | 52.6 | 52.6 | 6.08 | 5.94 | 5.99 | 6.08 |
| **FIRE | 9.6 | 9.7 | 9.7 | 10.0 | 7.08 | 6.95 | 6.93 | 6.95 |
| SERVICES | 54.4 | 55.7 | 55.1 | 54.1 | 7.49 | 7.39 | 7.35 | 7.60 |

| | Average Weekly Hours | | | | Average Hourly Earnings | | | |
|---|---|---|---|---|---|---|---|---|
| | Sep. 1988 | Aug. 1988 | July 1988 | Sep. 1987 | Sep. 1988 | Aug. 1988 | July 1988 | Sep. 1987 |
| TOTAL PRIVATE | 32.8 | 33.1 | 34.2 | 33.0 | $285.36 | $282.67 | $291.38 | $286.44 |
| MANUFACTURING | 38.1 | 38.1 | 39.1 | 38.5 | 407.29 | 399.29 | 418.37 | 409.26 |
| Durable Goods | 38.0 | 38.5 | 39.6 | 38.4 | 395.20 | 393.86 | 411.84 | 403.97 |
| Non-Durable | 38.4 | 37.3 | 37.9 | 38.7 | 433.92 | 411.79 | 431.68 | 421.06 |
| MINING | 39.8 | 39.4 | 41.0 | 40.1 | 535.71 | 519.69 | 546.94 | 548.17 |
| CONSTRUCTION | 37.5 | 39.4 | 39.3 | 37.3 | 538.13 | 556.72 | 556.88 | 530.78 |
| *TCU | 37.2 | 37.0 | 38.2 | 36.3 | 483.97 | 474.34 | 487.81 | 451.94 |
| Transportation | 36.0 | 36.8 | 37.2 | 35.9 | 445.32 | 453.01 | 446.40 | 418.95 |
| Communications, Utilities. | 39.4 | 37.4 | 39.7 | 37.0 | 552.78 | 510.88 | 553.42 | 505.79 |
| TRADE | 30.3 | 30.9 | 31.9 | 29.8 | 205.13 | 204.87 | 213.09 | 203.83 |
| Wholesale Trade | 37.0 | 38.2 | 38.8 | 37.2 | 333.37 | 338.45 | 346.87 | 345.22 |
| Retail Trade | 28.7 | 29.2 | 30.3 | 28.0 | 174.50 | 173.45 | 181.50 | 170.24 |
| **FIRE | 35.2 | 34.1 | 36.9 | 36.3 | 249.22 | 237.00 | 255.72 | 252.29 |
| SERVICES | 31.2 | 31.4 | 32.6 | 32.4 | 233.69 | 232.05 | 239.61 | 246.24 |

*Transportation/Communications/Utilities

**Finance/Insurance/Real Estate

Production workers are non supervisory and non government payroll personnel.

Source: See technical note S-4 on final page.

TABLE IV

THE CONSUMER PRICE INDEX - U.S.

ALL ITEMS

(1982-1984 = 100)

| | 1988 | | 1987 | | 1986 | |
|---|---|---|---|---|---|---|
| | CPI-U | CPI-W | CPI-U | CPI-W | CPI-U | CPI-W |
| January | 115.7 | 114.5 | 111.2 | 110.0 | 109.6 | 108.9 |
| February | 116.0 | 114.7 | 111.6 | 110.5 | 109.3 | 108.5 |
| March | 116.5 | 115.1 | 112.1 | 111.0 | 108.8 | 107.9 |
| April | 117.1 | 115.7 | 112.7 | 111.6 | 108.6 | 107.6 |
| May | 117.5 | 116.2 | 113.1 | 111.9 | 108.9 | 107.9 |
| June | 118.0 | 116.7 | 113.5 | 112.4 | 109.5 | 108.4 |
| July | 118.5 | 117.2 | 113.8 | 112.7 | 109.5 | 108.4 |
| August | 119.0 | 117.7 | 114.4 | 113.3 | 109.7 | 108.6 |
| September | 119.8 | 118.5 | 115.0 | 113.8 | 110.2 | 109.1 |
| October | 120.2 | 118.9 | 115.3 | 114.1 | 110.3 | 109.1 |
| November | | | 115.4 | 114.3 | 110.4 | 109.2 |
| December | | | 115.4 | 114.2 | 110.5 | 109.3 |
| Dec-to-Dec % | | | 4.4% | 4.5% | 1.1% | 0.6% |
| AVERAGE: | | | 113.6 | 112.5 | 109.6 | 108.6 |
| Ann Avg % | | | 3.6% | 3.6% | 1.9% | 1.6% |

| | | | Percent Change From | | |
|---|---|---|---|---|---|
| Expenditure Category CPI-U Index | Sep. 1988 | Aug. 1988 | July 1988 | Sep. 1987 | Sep. 1986 |
| ALL ITEMS | 119.8 [2] | 0.7% | 1.1% | 4.2% | 8.7% |
| Food & Beverages | 120.1 [2] | 0.6% | 1.1% | 5.2% | 9.0% |
| Housing | 119.9 [2] | 0.3% | 0.7% | 3.7% | 7.1% |
| Apparel & Upkeep | 117.8 [2] | 4.6% | 4.5% | 4.0% | 9.0% |
| Transportation | 109.7 [2] | 0.1% | 0.7% | 2.9% | 9.2% |
| Medical Care | 140.4 [2] | 0.4% | 0.8% | 6.6% | 13.4% |
| Entertainment | 121.3 [2] | 0.5% | 0.7% | 4.5% | 10.8% |
| Other Goods & Services | 140.0 [2] | 1.8% | 2.6% | 6.8% | 13.1% |

The Consumer Price Index (CPI) measures changes in prices of goods and services in major expenditure groups. The CPI for Urban Wage Earners and Clerical Workers (CPI-W) covers about 40 percent of the total noninstitutional population. The CPI for All Urban Consumers (CPI-U) covers about 80 percent of the total noninstitutional population, including wage earners and clerical workers, salaried workers, the self-employed, retirees, and the unemployed.

Table V

NEW BUSINESS FIRMS IN MONTANA

| AREAS | Jul To Sep 1988 | Jul To Sep 1987 | Year-to-Date 1988 | Year-to-Date 1987 |
|---|---|---|---|---|
| STATE OF MONTANA | 892 | 791 | 2617 | 2671 |
| GREAT FALLS MSA | 81 | 81 | 228 | 199 |
| BILLINGS MSA | 142 | 101 | 389 | 390 |
| MULTI COUNTY BUSINESS | 68 | 37 | 220 | 172 |
| ANACONDA-BUTTE LFA | 87 | 71 | 212 | 216 |
| BEAVERHEAD | 16 | 10 | 31 | 32 |
| DEER LODGE | 9 | 3 | 22 | 17 |
| GRANITE | 4 | 4 | 15 | 11 |
| MADISON | 6 | 11 | 23 | 37 |
| POWELL | 9 | 5 | 20 | 14 |
| SILVER BOW | 43 | 38 | 101 | 105 |
| BOZEMAN LFA | 66 | 58 | 239 | 213 |
| GALLATIN | 49 | 44 | 180 | 161 |
| MEAGHER | 3 | 0 | 7 | 4 |
| PARK | 14 | 14 | 52 | 48 |
| GLASGOW LFA | 23 | 18 | 66 | 70 |
| DANIELS | 2 | 1 | 9 | 3 |
| PHILLIPS | 4 | 4 | 11 | 8 |
| ROOSEVELT | 4 | 3 | 15 | 17 |
| SHERIDAN | 2 | 3 | 9 | 11 |
| VALLEY | 11 | 7 | 22 | 31 |
| GLENDIVE LFA | 14 | 24 | 57 | 59 |
| DAWSON | 6 | 6 | 16 | 25 |
| GARFIELD | 1 | 0 | 3 | 1 |
| MCCONE | 3 | 0 | 7 | 3 |
| PRAIRIE | 0 | 2 | 2 | 2 |
| RICHLAND | 4 | 14 | 29 | 24 |
| WIBAUX | 0 | 2 | 0 | 4 |
| HARDIN-RED LODGE LFA | 28 | 19 | 71 | 68 |
| BIG HORN | 10 | 8 | 20 | 23 |
| CARBON | 8 | 4 | 23 | 21 |
| STILLWATER | 8 | 3 | 18 | 9 |
| SWEET GRASS | 2 | 4 | 10 | 15 |
| HAVRE LFA | 12 | 8 | 41 | 44 |
| BLAINE | 2 | 1 | 9 | 8 |
| HILL | 8 | 7 | 29 | 31 |
| LIBERTY | 2 | 0 | 3 | 5 |
| HELENA LFA | 56 | 67 | 177 | 223 |
| BROADWATER | 5 | 4 | 15 | 10 |
| JEFFERSON | 2 | 9 | 19 | 26 |
| LEWIS & CLARK | 49 | 54 | 143 | 187 |
| KALISPELL LFA | 122 | 120 | 357 | 396 |
| FLATHEAD | 76 | 81 | 226 | 261 |
| LAKE | 22 | 16 | 57 | 61 |
| LINCOLN | 24 | 23 | 74 | 74 |
| LEWISTOWN LFA | 27 | 21 | 68 | 65 |
| FERGUS | 13 | 14 | 37 | 43 |
| GOLDEN VALLEY | 2 | 0 | 2 | 0 |
| JUDITH BASIN | 5 | 4 | 15 | 8 |
| MUSSELSHELL | 4 | 3 | 7 | 10 |
| PETROLEUM | 0 | 0 | 0 | 2 |
| WHEATLAND | 3 | 0 | 7 | 2 |
| MILES CITY LFA | 19 | 30 | 58 | 88 |
| CARTER | 0 | 2 | 2 | 3 |
| CUSTER | 3 | 11 | 14 | 36 |
| FALLON | 4 | 3 | 7 | 8 |
| POWDER RIVER | 2 | 1 | 9 | 8 |
| ROSEBUD | 8 | 12 | 23 | 29 |
| TREASURE | 2 | 1 | 3 | 4 |
| MISSOULA LFA | 113 | 118 | 357 | 397 |
| MINERAL | 1 | 3 | 4 | 10 |
| MISSOULA | 69 | 81 | 239 | 269 |
| RAVALLI | 32 | 23 | 94 | 85 |
| SANDERS | 11 | 11 | 20 | 33 |
| SHELBY-CUT BANK LFA | 34 | 18 | 77 | 71 |
| CHOUTEAU | 3 | 4 | 13 | 10 |
| GLACIER | 10 | 3 | 25 | 22 |
| PONDERA | 3 | 1 | 8 | 9 |
| TETON | 6 | 4 | 12 | 13 |
| TOOLE | 12 | 6 | 19 | 17 |

The new business tally includes successors to active accounts (an established business with a new owner) which amounts to nearly one-third of the total new businesses.
Source: See technical note S-6 on final page.

GLOSSARY OF TERMS

1. Civilian Labor Force - the number of persons 16 years and older, defined as employed or unemployed, excluding members of the armed forces.

2. Employed - those persons who work for pay or profit during a week or, as unpaid family workers, work 15 hours or more during a week. Also included as employed are those who although not working had some job attachment and were not looking for work, including persons temporarily absent from a job due to illness, bad weather, vacation, or labor dispute, whether or not they were in a pay status during their time off.

3. Unemployed - those persons who, for an entire week, did not work at all, were able to work and available for work, and (1) were looking for work or (2) would have looked for work except that (a) they were waiting to return to a job from which they had been laid off, or (b) they were waiting to report to a new wage and salary job scheduled to start within the following 30 days (and were not in school during the week).

4. Unemployment Rate - the number of unemployed expressed as a percent of the civilian labor force.

5. Residence Data - a count of people by where people live.

6. Establishment Data - a count of jobs by where people work.

7. Seasonally Adjusted Labor Force Series - to facilitate the evaluation of the labor force, recurrent yearly movements have been isolated and removed using the X-11 ARIMA method of seasonal adjustment. This is the same method used by the Bureau of Labor Statistics to seasonally adjust the national labor force series.

8. MSA - Metropolitan Statistical Area - as determined by the Office of Management and Budget. The MSA must have a central city with a population of 50,000 or more.

9. LFA - Labor Force Area as determined by the Research and Analysis Bureau, Montana Department of Labor and Industry, consists of a central city or cities with a population of less than 50,000 and the economically integrated geographical area surrounding it.

10. SDA - The Job Training Partnership Act (JTPA) was established to replace CETA in job search, placement, relocation, and especially training assistance. Each state designs local plans for JTPA programs through a Private Industry Council (PIC). Each PIC jurisdiction is known as Service Delivery Area (SDA). The two SDA's for Montana are known as Rural CEP (Beaverhead, Broadwater, Deer Lodge, Granite, Jefferson, Lewis & Clark, Madison, Meagher, Powell, and Silver Bow counties) and Balance of State (the other 46 counties).

11. BENCHMARKING - It is a continuous process of establishing a new set of data which affects the series of estimates through revisions. Once a new benchmark is established, the adjustments to estimates between the new benchmark and the preceding one are carried forward progressively to the current month by use of sample trends. The benchmark is established less frequently (usually once a year) based on sample or secondary data. In the case of employment data, the benchmark is used to establish the level of employment, while the sample is primarily used to measure the month - to - month changes in the level.

12. CES-790 Program - current employment statistics survey produces monthly estimates of a wide variety of employment and earnings information for the nation and each state.

SOURCES OF DATA

S-1. Prepared by the Montana Department of Labor & Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics (BLS). LAUS data (Local Area Unemployment Statistics program) are adjusted to the Current Population Survey benchmark and are the official BLS approved series that is used to allocate federal funds and determine eligibility for federal assistance programs. This series represents employment and unemployment by place of residence and is not comparable to the place-of-work industry employment series (CES data). Workers involved in labor disputes are counted as employed. Total employment in the labor force also includes agricultural workers, unpaid family workers, domestics, and self-employed.

S-2. Prepared by the Montana Department of Labor and Industry, Research and Analysis Bureau. The unadjusted unemployment rate is prepared by the LAUS program in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics. The seasonally adjusted rate is an unofficial series and is provided only as an informational economic time-series.

S-3. Prepared by the Montana Department of Labor and Industry, Research and Analysis Bureau from LAUS data. Data for Congressional Districts, Service Delivery Areas and Labor Force Areas are calculated from the official data series by summing up employment and unemployment for the appropriate counties involved and calculating an unemployment rate from the summed data for each area.

S-4. Prepared by the Montana Department of Labor and Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics. Data from the CES (Current Employment Statistics) program represent employment by place-of-work and cover full-time and part-time employees who worked during or received pay for the payroll period that includes the 12th of the month. The data exclude the self-employed, volunteers, unpaid family workers, and domestic workers. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Payroll and worker-hour data are collected for production and related workers in manufacturing industries, nonsupervisory workers in private service-producing industries, and construction workers in construction industries. The earnings figures are "gross" figures; that is, they reflect changes in wage rates, shift differentials, and premium pay for overtime work. The hours figures relate to the hours for which pay was received; this is different from scheduled or standard work hours.

S-5. Tabulations produced by the U.S. Department of Labor, Bureau of Labor Statistics and reprinted by the Montana Department of Labor and Industry, Research and Analysis Bureau for informational purposes only. This is a national data series because Montana data is not available.

S-6. Prepared by the Montana Department of Labor and Industry, Research and Analysis Bureau from Unemployment Insurance administrative records and is produced for informational purposes only.

S-7. Prepared by the Montana Department of Labor and Industry, Unemployment Insurance Division to meet federal reporting requirements (ETA 5159, DE 230, and ETA 2112 Reports) and is reprinted by the Research and Analysis Bureau for informational purposes only.

S-8. Prepared by the Montana Department of Labor and Industry, Unemployment Insurance Division and is reprinted by the Research and Analysis Bureau for informational purposes only. (DE 230 Report.)

The Montana State Job Service Division maintains 23 loca Job Service Offices in principal cities of Montana. You are invited to call on any of these offices for assistance in filling positions in your organization, obtaining additional labor market information and for receiving other services in connection with your employment needs.

LOCAL JOB SERVICE OFFICE LISTING

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307 E. Park
Anaconda, MT 59711
(563-3444)

BILLINGS
1425 Broadwater Ave.
Suite E
Billings, MT 59102
(259-5529)

BOZEMAN
121 N. Willson
Bozeman, MT 59715
(586-5455)

BUTTE
206 W. Granite
P.O. Box 309
Butte, MT 59703
(782-0417)

CUT BANK
20 S. Central
Cut Bank, MT 59427
(873-2191)

DILLON
310 E. Sebree
P.O. Box 1300
Dillon, MT 59725
(683-5501)

GLASGOW
238 2nd Ave. S.
Glasgow, MT 59230
(228-9369)

GLENDIVE
211 S. Kendrick
Glendive, MT 59330
(365-3314)

GREAT FALLS
1018 7th St. S.
Great Falls, MT 59405
(761-1730)

HAMILTON
333 Main Street
P.O. Box 73
Hamilton, MT 59840
(363-1822)

HAVRE
416 1st St.
Havre, MT 59501
(265-5847)

HELENA
715 Front Street
Helena, MT 59601
(449-6006)

KALISPELL
427 1st Ave. E.
Kalispell, MT 59901
(257-5627)

LEWISTOWN
324 W. Broadway
Lewistown, MT 59457
(538-8701)

LIBBY
314 S. Mineral Ave.
Libby, MT 59923
(293-2682)

LIVINGSTON
228 S. Main
P.O. Box 1199
Livingston, MT 59047
(222-0520)

MILES CITY
12 N. 10th
P.O. Box 1786
Miles City, MT 59301
(232-1316)

MISSOULA
539 S. 3rd St. W.
P.O. Box 5027
Missoula, MT 59806
(728-7060)

POLSON
417 Main Street
P.O. Box 970
Polson, MT 59860
(883-5261)

SHELBY
402 1st Street S.
Shelby, MT 59474
(434-5161)

SIDNEY
120 S. Central
Sidney, MT 59270
(482-1204)

THOMPSON FALLS
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Thompson Falls, MT 59
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WOLF POINT
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Wolf Point, MT 59201
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